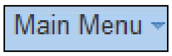
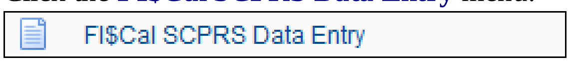
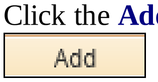
Creating a SCPRS entry

Step	Action
1.	Begin by navigating to the **SCPRS Data Entry** page. Click the **Main Menu** button. 
2.	Click the **FI$Cal SCPRS** menu. 
3.	Click the **FI$Cal SCPRS Data Entry** menu. 
4.	The **Find an Existing Value** and **Add a New Value** tabs are usually shown together in FI$Cal. The **Find an Existing Value** tab is used to locate SCPRS entries already created by your department. The **Add a New Value** tab is used to create a SCPRS entry in FI$Cal. In this scenario, the **Add a New Value** tab will be used.
5.	The **Business Unit** is your department's unique identifier within FI$Cal. You will only be able to modify the field, if you are assigned to multiple departments.
6.	The **Purchase Document #** is the unique ID your department uses to identify this purchase order. Your entry should follow your department's rules for how to refer to a unique purchase order or contract document, or CalCard transaction.
7.	Click in the **Purchase Document #** field. 
8.	Enter the desired information into the **Purchase Document #** field per your departments business process. Enter a valid value e.g. "**PO734670**".
9.	Click the **Add** button. 
10.	The **SCPRS Entry** page displays. This page collects all information required by FI$Cal SCPRS to record your department's purchase order or contract. This begins with the SCPRS header information.

Step	Action
11.	Notice that certain fields are marked with an asterisk (*), such as **DGS Billing Code, Acquisition Type** and **Acquisition Method.** This indicates that the field is required to be populated.
12.	The **Purchase Order Date** will automatically default to the current day unless specified otherwise. This should be the date that the purchase order was created at your department. If needed, you would edit the date accordingly at this time.
13.	Before populating any other information field on this page, it is a best practice to verify that the vendor associated with this SCPRS entry has an existing record in FI$Cal by using the **Vendor ID** look up feature or the **Advanced Vendor Search** page.
14.	Click the **Look up Vendor ID** button.
15.	On the **Look Up Vendor ID** page, there are many different search criteria fields you could use to locate a supplier. For example, you can search by **Name, Address,** or **Vendor ID**. If you cannot find the desired supplier using the search criteria on this page, the **Advanced Vendor Search** link on the previous page provides even more search criteria to use.
16.	Click the **Cancel** button. Cancel
17.	Click the **Advanced Vendor Search** link. Advanced Vendor Search
18.	The **Vendor/Bidder Search** page then opens in a new window. This page provides additional criteria to use when searching for a supplier.
19.	For example, you can use this page to search for suppliers according to the **Category** (UNSPSC) codes they are associated with, **Service Areas** where they can do business, their **Certification ID**, or their **Tax Identification Number** (TIN).
20.	You also have the option to refine the search results so that only those that are registered as a **Small Business** (SB) or **Disabled Veteran Business Enterprise** (DVBE) will display.
21.	Next, conduct a search for all registered SB and DVBEs in the Sacramento Service Area. To do so, you will first need to set the **Bidder Type** field to "Vendor."
22.	Click the **Bidder Type** list. All Vendor and Bidder
23.	Click the **Vendor** list item. Vendor
24.	Click the **Service Area ID** button.
25.	Click the **018** link. 018
26.	Click the **Small Business** option. Small Business

Step	Action
27.	Click the **Disabled Veteran Business Enterprise** option.
28.	Click the **Search** button.
29.	Click the **Vertical Scrollbar.**
30.	The **Search Results** grid now shows a list of all suppliers who fit your search criteria.
31.	Click the **Horizontal Scrollbar.**
32.	In addition to the supplier **Name, Address** and **Primary Contact** information, those that are registered as SB/DVBE have a **View Certification** link that will navigate you to view their SB/DVBE application.
33.	You may also use the **View Bidder Profile** link to view additional Address, Contact and Identification information for any registered Bidder in FI$Cal.
34.	Click the **Horizontal Scrollbar.**
35.	In this scenario, you wish to use **Marketware Technologies** as your supplier. Now that you have verified they have an existing record in FI$Cal, you can find and select the supplier on the **Look up Vendor ID** page. If the appropriate vendor is not listed here in the Vendor Management File (VMF), please see the "Adding a SCPRS supplier" topic for additional training.
36.	Click the **Close Tab** button on the **FI$Cal** tab.
37.	After locating the appropriate supplier using the **Vendor/Bidder Search** page, you will still need to select that supplier from the **Look up Vendor ID** page.
38.	Click the **Look up Vendor ID** button.
39.	Recall that in this scenario, the desired supplier is **Marketware Technologies**.
40.	Click in the **Name 1** field.
41.	Enter the desired information into the **Name 1** field. Enter a valid value e.g. "**Marketware**".
42.	Click the **Look Up** button.
43.	Click the **MARKETWARE TECHNOLOGIES** link.
44.	Notice that the **Vendor ID** (0000025957) and **Vendor Name** (Marketware Technologies) are now displayed on the SCPRS Entry page.

Step	Action
45.	If a Small Business (SB) or Disabled Veteran Business Enterprise (DVBE) was used as a subcontractor to the supplier on this purchase order, this information can be recorded on the **Subcontracting and SB/DVBE Contracting** page. Also, if the supplier you just previously selected is certified as either a SB or DVBE, their certification information will also be displayed on this page.
46.	Click the **Subcontracting and SB/DVBE Contracting** link. Subcontracting and SB/DVBE Contracting
47.	The **SB/DVBE Contracting** page displays. If the supplier identified on the previous page is a certified SB/DVBE, their certification information will populate on the first line and they will be identified as the "Prime" supplier for this entry.
48.	**Marketware Technologies** is a certified Small Business in FI$Cal, therefore their Certification information is shown on this page. You can observe the **Certification Number** and type of certification for this business on this page.
49.	Click the **Horizontal Scrollbar.**
50.	Notice that the **Prime** option is defaulted for this supplier. This happens when you select a supplier from the Vendor ID field on the previous page.
51.	If you insert multiple rows of suppliers that were involved with this SCPRS entry, ensure you enter the percent allocated to each in the **Percentage** field. You must enter the percentage manually; FI$Cal will not auto-calculate. **Note:** When selecting a Prime supplier, you **must** set their Percentage value to 100 in order for SB/DVBE reporting to function properly.
52.	Click in the **Percentage** field.
53.	Enter the desired information into the **Percentage** field. Enter a valid value e.g. "**100**".
54.	In this scenario, one additional company was used as a subcontractor for this SCPRS entry. Use the **Add a new row at row 1** (+) button to enter the subcontractor information.
55.	Click the **Add a new row at row 1** button.
56.	An additional row appears, allowing you to search for the additional subcontractor. You must now add the subcontractor and define their percentage for this SCPRS entry.
57.	Click the **Supplier Search** link. Supplier Search

Step	Action
58.	Use the **Supplier Search** page to find and add the subcontractor needed for this SCPRS entry. In this scenario, **JM Consulting, INC.** was a subcontractor to Marketware Technologies.
59.	Click in the **Company Name** field.
60.	Enter the desired information into the **Company Name** field. Enter a valid value e.g. "**JM Consulting, INC.**".
61.	Click the **Search** button. Search
62.	Click the **BID0000051** option.
63.	Click the **OK** button. OK
64.	The information for JM Consulting, INC. is now shown on the SB/DVBE Contracting page. Notice that they are also a registered **Small Business** with a **Certification Number** displayed here.
65.	Click the **Horizontal Scrollbar.**
66.	Notice that JM Consulting, INC. has also automatically been identified as the subcontractor for this entry, as noted by the selected option in the Sub column of their information.
67.	Lastly, define the percentage of the entry that was awarded to JM Consulting, INC. If you inserted multiple rows of subcontractors, ensure you enter the percent allocated to each in the **Percentage** field. You must enter the percentage manually; FI$Cal will not auto-calculate.
68.	Click in the **Percentage** field.
69.	Enter the desired information into the **Percentage** field. Enter a valid value e.g. "**25**".
70.	Click the **Horizontal Scrollbar.**
71.	Click the **OK** button. OK

Step	Action
72.	The Department of General Services (DGS) has assigned your department a specific billing code. This code will be entered in the **DGS Billing Code** field. You can either manually type in your DGS Billing Code, or use the Lookup glass next to the field to see a list of all possible values available for use.
73.	Click the **Horizontal Scrollbar.**
74.	Click the **Look up DGS Billing Code** button.
75.	Click the **030001** link. 030001
76.	Click the **Horizontal Scrollbar.**
77.	Use the **CalCard** checkbox to indicate if a State of California Purchase Card (CalCard) was used on the purchase order. Otherwise, leave this box unchecked.
78.	Use the **Blanket PO** checkbox to indicate if the purchase order being recorded is a blanket PO for the vendor. Otherwise, leave this box unchecked.
79.	Next, choose an **Acquisition Type** and **Method** for this SCPRS entry. Note: The Encumbrance Only Acquisition Type is for transactions that are non-procurement purchases, such as rent, leases, utilities, and payments. It is not to be used for SCPRS entries.
80.	Click the **Look up Acquisition Type** button.
81.	Click the **IT Goods** link. IT Goods
82.	Click the **Look up Acquisition Method** button.
83.	Click the **Vertical Scrollbar.**
84.	Click the **SB Option - COMPETITIVE** link. SB Option - COMPETITIVE
85.	If applicable, enter the **IBond** information for this purchase order. **Note:** This field is not often populated. As defined in the State Contracting Manual (SCM), it is only applicable for state-managed bond programs.
86.	A buyer must be added to the purchase order information. This field is required. **Note:** If the particular buyer for this SCPRS entry is not located in the BuyerContact list, you will need to contact the FI$Cal Service Center (FSC) for further assistance in adding the appropriate buyer to the list.
87.	Click the **Look up BuyerContact** button.

Step	Action
88.	In this scenario, **Gregory Davis** was the buyer for this purchase order. Gregory's Buyer ID is 10000015.
89.	Click the **Gregory Davis** link. Gregory Davis
90.	Although Comments are not part of DGS requirements, your department can use this field for department-specific purposes.
91.	Click in the **Comments** field.
92.	Enter the desired information into the **Comments** field. Enter a valid value e.g. "**See attached for justification**".
93.	If desired, use the **Attachments** link to upload a document pertaining to this SCPRS entry.
94.	Click the **Attachments** link. Attachments
95.	The **SCPRS Header Attachment** page is displayed. This page is used to enter comments or upload attachments to the SCPRS entry. Comments and attachments posted here will refer to the entry as a whole. You will also have an option to attach a file or comment to each specific line item on the entry.
96.	Click in the **Comments** field.
97.	Enter the desired information into the **Comments** field. Enter a valid value e.g. "**Justification for purchase is attached**".
98.	Use the **Attach** button to search for a file on your computer to upload.
99.	Click the **Attach** button. Attach
100.	Click the **Browse** button. Browse...
101.	Click the **Associated Documentation** list item.
102.	Click the **Open** button. Open
103.	Click the **Upload** button. Upload
104.	In this scenario, you chose to include a document that details the reasoning behind this purchase.

Step	Action
105.	You can view the document you just attached, or remove it from this entry by using the **View** and **Delete** buttons, respectively.
106.	To enter multiple comments or attachments use the **add new row** button.
107.	Click the **OK** button. OK
108.	The **Funding** field is used to denote a funding option for the SCPRS entry, if necessary. Options in the Funding field are either Financed or Leased. **Note:** This is not a required field.
109.	Depending on the Acquisition Method you chose for the purchase, you may be required to select a valid Leveraged Procurement Agreement (LPA). If this is the case, the **LPAContractNumber** field will automatically display an asterisk (*) by the field name. The supplier selected for your purchase in FI$Cal must then match the supplier listed on the LPA you choose.
110.	If you have procured services with this purchase order, you will need to record the **Start** and **End Dates** of the services. If you have only purchased a good, enter the date on purchase order as both the Start and End Date.
111.	Click the **Choose a date** button for the **Start Date.**
112.	The **Start Date** here is the same date as on the purchase order or contract. Click the **6** date. 6
113.	Click the **Choose a date** button for the **End Date.**
114.	Click the **6** date. 6
115.	Click the **Vertical Scrollbar.**
116.	Next, define the fiscal year the transaction is associated with by entering dollar values in the appropriate fiscal year fields. The funding for the transaction may span across multiple fiscal years. If that were the case, you would identify a dollar value to assign to each different fiscal year as appropriate. The cost of this purchase will all be allotted to the 2015-2016 fiscal year.
117.	In this scenario, the total cost of this transaction was $10,000.
118.	Click in the **2015-2016** field.

Step	Action
119.	Enter the desired information into the **2015-2016** field. Enter a valid value e.g. "**10000**".
120.	Lastly, use the **Item Description** section to define information with the actual goods/services procured.
121.	First, enter a value in the **Line Number** field.
122.	Click in the **Line Number** field.
123.	Enter the desired information into the **Line Number** field. Enter a valid value e.g. "**1**".
124.	It is possible to use the **Item ID** look up feature to locate predefined items from FI$Cal's item catalog. Items in the catalog are those from CalPIA and any items from Leveraged Procurement Agreements (LPAs).
125.	Click the **Look up Item ID** button.
126.	Selecting an item from this list would subsequently populate additional fields, such as the **Item Description** and **Unit of Measure.** In this scenario, you are not purchasing any items from CalPIA or items from an LPA.
127.	Click the **Cancel** button. Cancel
128.	Use the **Item Description** field to enter text that defines the goods/services on this entry.
129.	Click in the **Item Description** field.
130.	Enter the desired information into the **Item Description** field. Enter a valid value e.g. "**Tablet Computers**".
131.	If this item complies with the EPP or SABRC programs, you could use the **EPP/SABRC** link to capture that information.
132.	Click the **EPP/SABRC** link. EPP/SABRC
133.	The **SABRC/EPP Information** page displays. Use this page for entering the relative information about your PO. Departments should work with **DGS/CalRecycle** to learn when they will need to use EPP/SABRC item reporting. Questions about the programs will be addressed by the DGS "Buying Green" division.

Step	Action
134.	If applicable, you may select a **Third-Party Certification.** A Third-Party Certification is an independent assessment declaring that specified product requirements and environmental standards have been met. It also ensures and assesses compliance, and can provide an official certification mark or a declaration of conformity, such as Energy Star, Green Seal, or Forest Sustainability Certification.
135.	The **SABRC Reportable** section allows you to determine whether or not the item is SABRC reportable. **SABRC Reportable** refers to the purchase of any goods or materials that may be reported, categorized or classified within one of the product categories identified in PCC 12207. If the goods/materials fall within a SABRC category, it is reportable whether or not it contains post-consumer recycled content (PCRC).
136.	**Postconsumer Recycled Content** (PCRC) refers to finished material that would have been disposed of as a solid waste, having completed its life cycle as a consumer item, and does not include manufacturing wastes.
137.	The **Total Recycled Content %** field refers to pre- and postconsumer waste of any kind.
138.	The **PCRC Source** field indicates the Postconsumer Recycled Content verification source or method (e.g., product label, manufacturer's website, or product specifications).
139.	The **EPP** and **SABRC Compliant** fields will automatically update based on your entered values. FI$Cal uses your responses to determine whether the item is EPP and/or SABRC compliant.
140.	In this scenario, the goods on the SCPRS entry do not have any EPP/SABRC information to record.
141.	Click the **Cancel** button. Cancel
142.	Choose the unit of measure for how you ordered these goods/services. In this case, you are buying individual computers. Therefore, the most appropriate Unit of Measure is "**Each**". You can either manually enter a value, or use the Lookup glass next to the field to search for all available Unit of Measure options.
143.	Click the **Look up Unit of Measure To** button.
144.	Click in the **Unit of Measure** field.
145.	Enter the desired information into the **Unit of Measure** field. Enter a valid value e.g. "**ea**".

Step	Action
146.	Click the **Look Up** button. Look Up
147.	Click the **EA** link. EA
148.	Next, enter the quantity of the item that you have ordered.
149.	Click in the **Quantity** field.
150.	Enter the desired information into the **Quantity** field. Enter a valid value e.g. "**10**".
151.	Use the **Amount** field to define the cost of each unit of the item. FI$Cal will then automatically calculate the grand total of the entry for you. This is displayed near the top of the page in the **Report SCPRS Order** section.
152.	Click in the **Amount** field.
153.	Enter the desired information into the **Amount** field. Enter a valid value e.g. "**1000**".
154.	Lastly, use the **UNSPSC** field to either manually enter or look up a category code for this type of good/service. In this scenario, you are going search for the UNSPSC. Use the Look up feature to sort through the UNSPSC codes.
155.	Click the **Look up UNSPSC** button.
156.	Click in the **Description** field.
157.	Enter the desired information into the **Description** field. Enter a valid value e.g. "**tablet computers**".
158.	Click the **Look Up** button. Look Up
159.	Click the **Tablet computers** link. Tablet computers
160.	Click the **Horizontal Scrollbar.**
161.	If desired, you can use the **Attachments** link to provide comments or associated documents for this particular line item.
162.	Click the **Attachments** link. Attachments

Step	Action
163.	The **SCPRS Line Attachment** page displays. This page differs from the **SCPRS Header Attachment** page in that comments and attachments entered here refer to the individual line item. In a scenario where you have multiple line items, you can separate your pertinent attachments for each different item using this page for each line item.
164.	In this scenario, provide an attachment detailing out the specifications of the ordered goods.
165.	Click the **Attach** button. Attach
166.	Click the **Browse** button. Browse...
167.	Click the **Tablet_Computer_Specifications** list item.
168.	Click the **Open** button. Open
169.	Click the **Upload** button. Upload
170.	The selected attachment is now uploaded to this line item.
171.	To add additional information relating to the item use the **Comments** section.
172.	Click in the **Comments** field.
173.	Enter the desired information into the **Comments** field. Enter a valid value e.g. "**See attached for tablet specs**".
174.	To add additional attachments and comments for this line item, use the **add a new row** (+) button to create another comment or upload another attachment.
175.	Click the **OK** button. OK
176.	Now that you have completed all required information, save the entry.
177.	Click the **Save** button. Save
178.	You have successfully completed the "Creating a SCPRS entry" topic. **Key Takeaways:** - SCPRS entries are now entered within the FI$Cal SCPRS area - A SCPRS entry must be created for every department purchase order and contract - Once all the PO information required by the Department of General Services (DGS) is entered, the SCPRS entry can be saved in FI$Cal **End of Procedure.**